

Automated User Account Setup
Electronic Records Express Website
Regional Administrator and Sponsor
Instruction Guide



Office of Disability Adjudication and Review

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**** Note:** All subjects and page numbers are hyperlinked. By holding the [CTRL](#) key and clicking the desired subject or page number you will be taken directly to the page within the document that contains the desired set of instructions.

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AUAS Roles

Automated User Account System (AUAS) privileges and rights are based on the assigned role: Administrator, Regional Administrator, Sponsor, or End-User. Each account has one assigned role. The assigned role cannot be modified.

The Administrator role is comprised of members from the Electronic Medical Evidence and Health Information Branch. The Regional Administrator role is comprised of Office of Disability Adjudication and Review (ODAR) Regional Office, Office of the Chief Administrative Law Judge, and ODAR Headquarters' staff and ODISP staff designated to maintain Sponsor accounts. The Sponsor role is comprised of Professional Relation Officers (PRO), Medical Relation Officers (MRO) and ODAR hearing office staff designated to maintain End-User accounts. The End-User role is assigned to accounts that can send or receive documents via the Electronic Records Express Website.

Only an Administrator can create/modify Administrator and Regional Administrator accounts. Administrators and Regional Administrators can create/modify Sponsor Accounts. Administrators, Regional Administrators and Sponsors can create/modify End-User accounts. All users can modify select information within their own accounts. (See Figure 1 below)

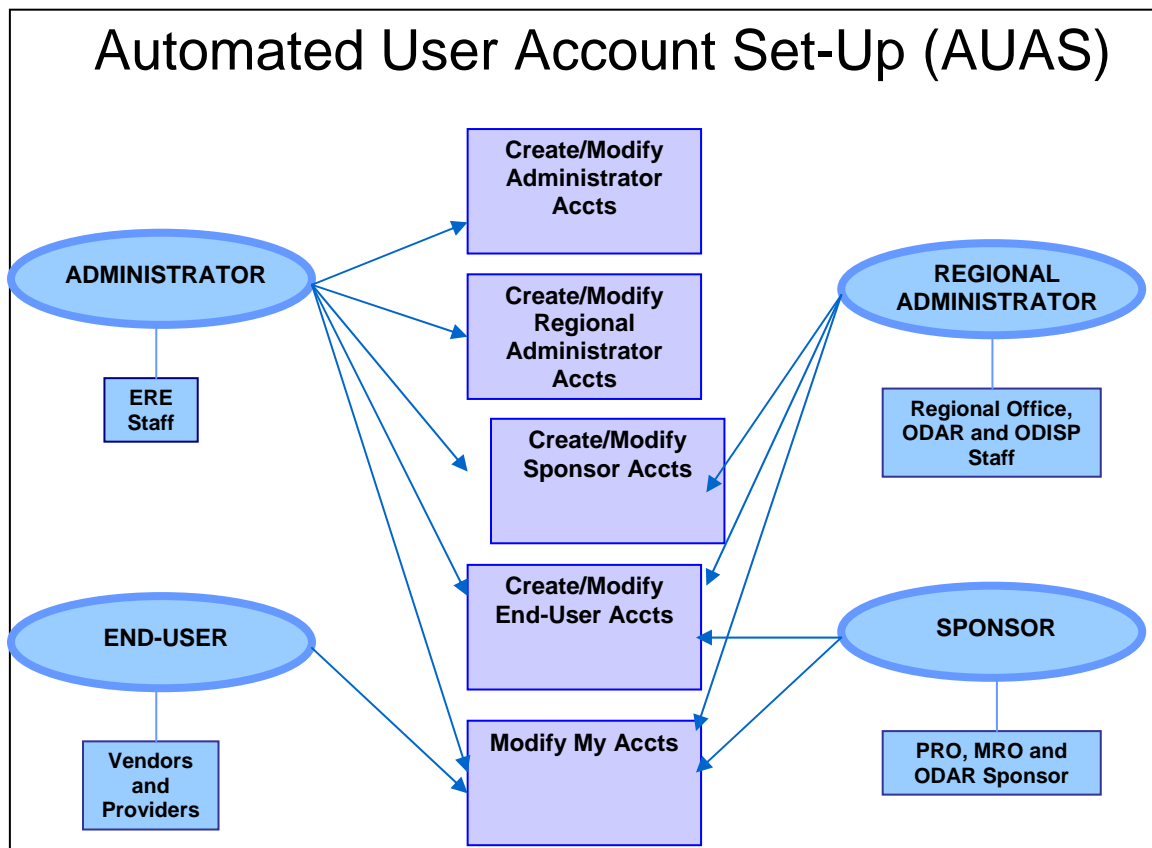


Figure 1: AUAS Roles

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Administrator Privileges and Rights

The Regional Administrator has the authority to create and modify Sponsor and End User accounts. (See Figure 1 on page 1)

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Access the Account Maintenance Menu

- Step 1:** Login to the Electronic Records Express website using the personal User ID and password that has been assigned to you. The website address is: <http://eme.ssa.gov>. Upon successful login, you will see the Electronic Records Express homepage.
- Step 2:** Select the **Account Maintenance** hyperlink within the left navigation panel. This hyperlink is only displayed if the account role is Administrator, Regional Administrator or Sponsor. (See Figure 2 below)



Figure 2: Account Maintenance Access

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Step 3: The **Account Maintenance Menu** screen will be displayed (See Figure 3 below). The Account Maintenance Menu only displays the functions to which the account has privilege. The Administrator role has the highest level of authority; therefore, all functions are displayed.



Figure 3: Account Maintenance Menu

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Create an Account

First, the type of account you wish to create must be determined based on whether there is a need to send or receive documents via the Electronic Records Express Website, or the role of the user. **Only end-user accounts can send or receive documents via the Electronic Records Express Website.** ODAR will establish an individual account for end-users. See the following instructions for the type of account you wish to create: [Create an Individual End-User Account](#) or [Create a Sponsor Account](#)

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Create an Individual End-User Account

An individual end-user account is established when only one person will have access to the account. ODAR will only create individual end user accounts for user representatives. Do not create any Organizational Shared End-User Accounts. See the following steps for the creation of an individual end-user account.

Step 1: Select the **Create an Individual End User Account** hyperlink from the Account Maintenance Menu.

****Note** that mandatory fields on this webpage are marked with a red asterisk (*).

Step 2: Enter the desired **User ID** in the text box. The User ID should be the first four characters of the individual's last name and the last four digits of their social security number. **SSA Policy requires that all User IDs be exactly 8 characters in length** and they must contain at least 1 numeric and 1 alphabetic character. Special characters (e.g., &, %, #, @, etc.) are not permitted. (See Figure 4 below). If the last name is less than 4 characters, use the initial of their first name.

NOTE: Select the **Demo Account** checkbox if you wish to establish a demo account for demonstration purposes. Demo accounts should only be selected if documents will **NOT** be sent nor received via the Electronic Records Express Website. Documents submitted via a demo account are not received by DMA and are not routed to the electronic folder. Do not check this box when setting up accounts for end user representatives who will need to upload evidence via the ERE.

The screenshot shows the 'Electronic Records Express' website interface. The main heading is 'Electronic Records Express' with the sub-heading 'Create an Individual End-User Account'. A note states: 'An asterisk (*) indicates a mandatory field.' The form contains the following fields and controls:

- ☐ Demo Account
- User Id * [text box] [Check User Id button]
- First Name: * [text box]
- Middle Name: [text box]
- Last Name: * [text box]
- Organization Type: * [Select Type dropdown]
- Organization Name: [text box]
- Department: [text box]
- Position: [text box]
- Primary Phone: * [text box] Ext: [text box] [Select Type dropdown]
- Alternate Phone: [text box] Ext: [text box] [Select Type dropdown]
- Alternate Phone: [text box] Ext: [text box] [Select Type dropdown]
- Alternate Phone: [text box] Ext: [text box] [Select Type dropdown]

A green box highlights the 'Demo Account' checkbox and the 'User Id' field. A green arrow points from the 'Check User ID' button to the 'User Id' field.

Figure 4: Create an Individual End-User – User ID.

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Step 3: Click the **Check User ID** button to verify if the User ID entered is unique (see Figure 4 on page 4).

If an alert is received stating that the User ID you entered is already in use, verify if the existing account is for the same user (see Figure 5 below). You may need to update the existing account instead of creating a new account. If the existing account does not belong to the same user or if a new account is required for the same user, you must assign a different User ID to create the new account. (See Page 16 for Search on Specified Criteria instructions)

If the User ID is not in use (see Figure 15 on page 12), the User ID may be used for account setup. Continue to the next field.



The screenshot shows the 'Electronic Records Express' page on the Social Security Online portal. The page title is 'Electronic Records Express' with the subtitle 'Create an Individual End-User Account'. A green box highlights an alert message: 'User ID buise001 already in use, please select a different User ID.' Below the alert, there is a checkbox for 'Demo Account' and a 'Check User ID' button. The 'User Id' field contains 'buse001'. Below this are fields for 'First Name', 'Middle Name', and 'Last Name', each with an asterisk indicating a mandatory field. A green arrow points from the 'Change Password' link in the left sidebar to the 'Check User ID' button.

Figure 5: Create an Individual End-User – Check User ID alert

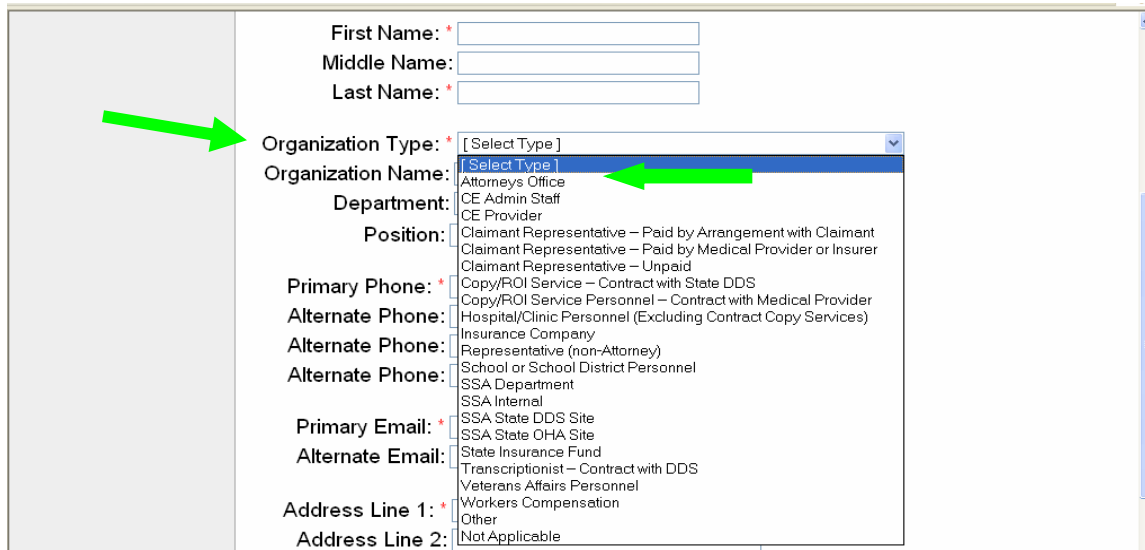
Step 4: Enter the requested **User** information:

- **First Name** (See Figure 6 on page 6)
- **Middle Name**
- **Last Name**

Step 5: Enter the requested **Office** information:

- **Organization Type** – Select from the dropdown menu (See Figure 6 on page 6)
- **Organization Name** – enter the name of the organization that the user represents
- **Department**
- **Position**
- **Telephone Number(s)**
- **Phone Type(s)** – Select the type from the dropdown menu for each phone number entered (See Figure 7 on page 6)
- **Email Address(es)**
- **Address**

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First Name: *

Middle Name:

Last Name: *

Organization Type: * [Select Type]

Organization Name: [Select Type]

Department:

Position:

Primary Phone: *

Alternate Phone:

Alternate Phone:

Alternate Phone:

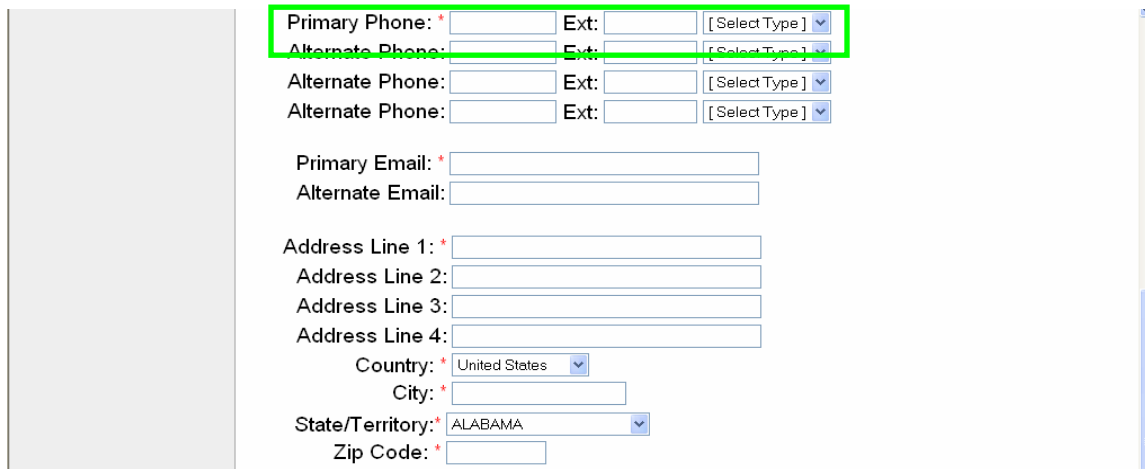
Primary Email: *

Alternate Email:

Address Line 1: *

Address Line 2:

Figure 6: Create an Individual End-User – Organization Type



Primary Phone: * Ext: [Select Type]

Alternate Phone: * Ext: [Select Type]

Alternate Phone: * Ext: [Select Type]

Alternate Phone: * Ext: [Select Type]

Primary Email: *

Alternate Email:

Address Line 1: *

Address Line 2:

Address Line 3:

Address Line 4:

Country: * United States

City: *

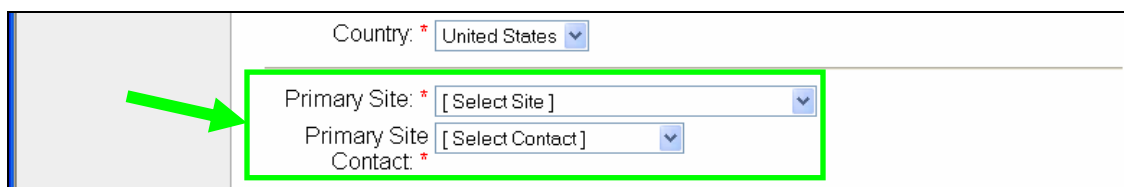
State/Territory: * ALABAMA

Zip Code: *

Figure 7: Create an Individual End-User – Phone Type

Step 6: Enter **Sponsor** information (See Figure 8 below):

- **Primary Site** – Select the sponsoring ODAR site from the dropdown menu
- **Primary Site Contact** – Select the Sponsor from the dropdown list. This should be the Hearing Office Director.



Country: * United States

Primary Site: * [Select Site]

Primary Site Contact: * [Select Contact]

Figure 8: Create an Individual End-User – Sponsor Information

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Step 7: Select the **Functions** (website utilities) to which the user will have access. Select all utilities the user needs. (See Figure 9 below). At this time, ODAR is only giving access to the Communication Utility and Send Individual Case (MER).

Primary Site: * [Select Site] ▼

Primary Site Contact: * [Select Contact] ▼

Select the functions that apply to the user: *

☐ Communications Utility (CU)

☐ Send Individual Case (MER)

Add Comments:

Create Cancel

Figure 9: Create an Individual End-User – Functions

Step 8: Enter any **Comments** in the text box.

Step 9: Click the **Create** button to create the account **OR** click the **Cancel** button to cancel the account setup and return to the Account Maintenance Menu. The **Account Summary** page is generated when the **Create** button is selected. (See Figure 10 on page 8)

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Social Security Online

www.socialsecurity.gov

Electronic Records Express

Home

Questions?

How to Contact Us


Search

Electronic Records Express Home

Account Maintenance Menu

Change Password

Logout



Electronic Records Express

Create an Individual End-User Account

User Id: ODAREND1 (Demo Account)

First Name: Representative

Middle Name:

Last Name: User

Organization: Attorneys Office

Type:

Organization Name:

Department:

Position:

Primary Phone: 000-000-0000 Ext: Type: WORK

Alternate Phone: Ext: Type:

Alternate Phone: Ext: Type:

Alternate Phone: Ext: Type:

Primary Email: representative.user@ssa.gov

Alternate Email:

Address Line 1: 123 Anywhere

Address Line 2:

Address Line 3:

Address Line 4:

City: Falls Church

State/Territory: VA

Zip Code: 12345

Country: United States

Primary Site: AL - BIRMINGHAM ODAR []

Primary Site Contact:

Function(s) selected: Communications Utility (CU) Send Individual Case (MER)

Added Comments:

Edit

Submit

Cancel

Figure 10: Create an Individual End-User – Account Summary Page

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Step 10: From the **Account Summary** page, click the **Edit** button to change any information on the prior screen **OR** click the **Cancel** button to cancel the account setup **OR** click the **Submit** button to create the account.

Step 11: Clicking **Submit** button will activate the new account. You will receive a **Confirmation** screen that provides the **Temporary Password** for the new account. (See Figure 11 below)

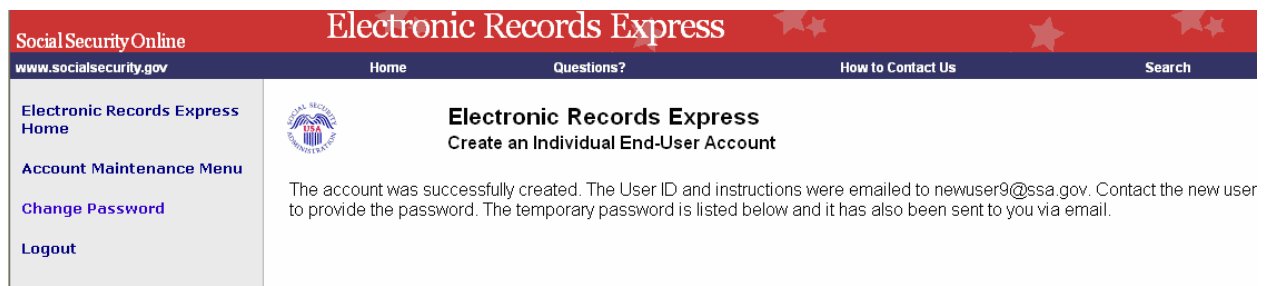


Figure 11: Create an Individual End-User – Confirmation Screen

Step 12: The following **emails** are automatically sent to provide notification of the new account.

- a. A confirmation email that includes the temporary password and identifying information for the new user will be sent to the creator of the account. The creator of the account must notify the new user of their new account password. (Figure 12 below)

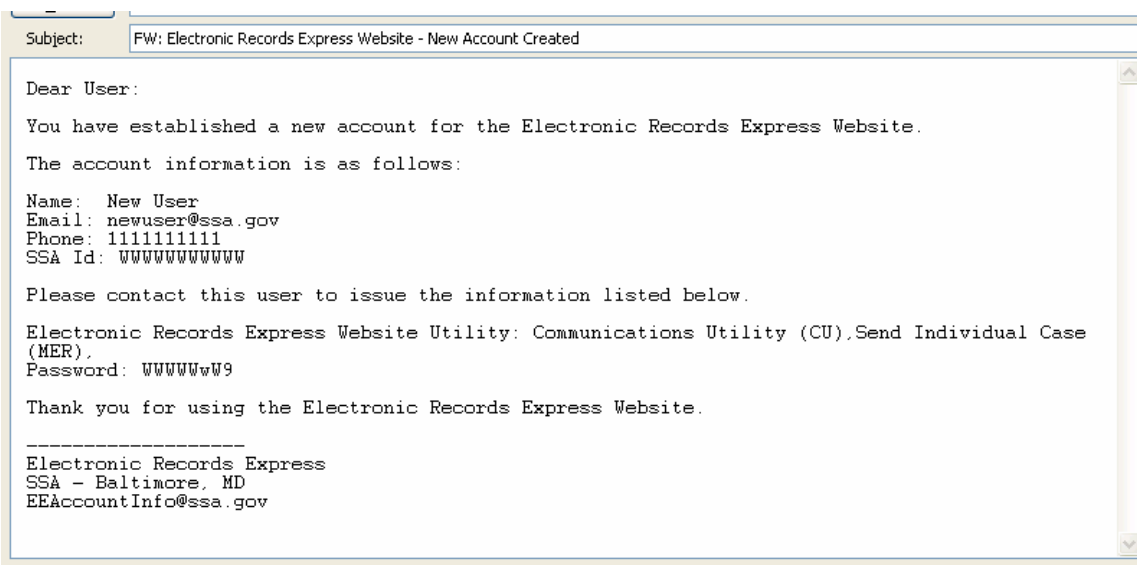


Figure 12: Email to creator that New End User Account was added

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- b. An email is sent to the new user to provide the User ID, instructions and Sponsor (Primary Site Contact) information. (figure 13 below)

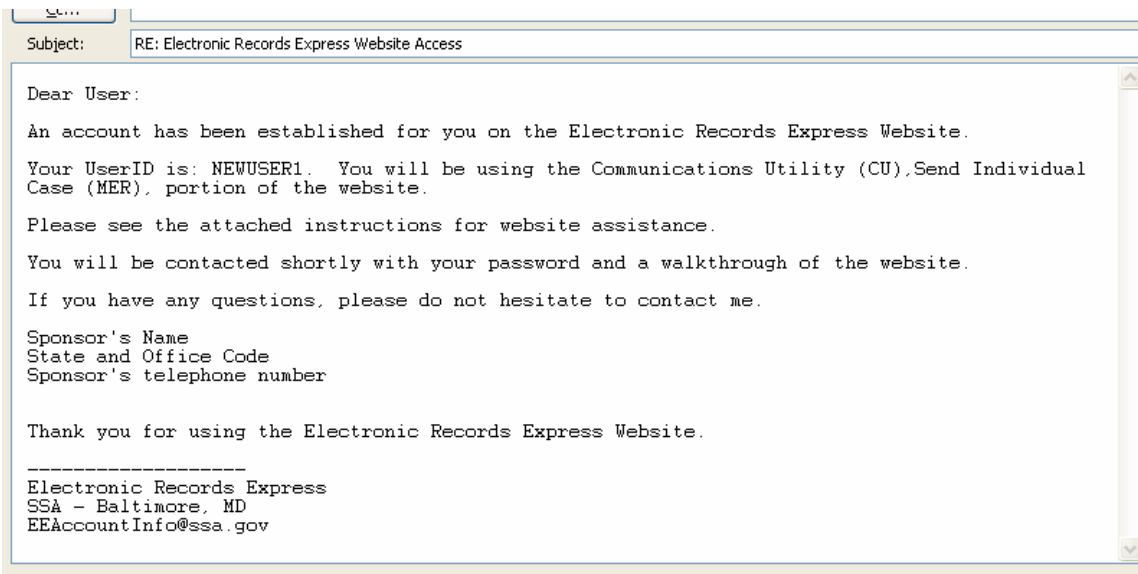


Figure 13: Email to new end user that new account was created

Step 13: The **Sponsor** (Primary Site Contact) must contact the new user to provide the password. The temporary password which was automatically generated by the website is valid for one time use only. The first time the new user logs into the website, he/she must change the password. **The ODAR Sponsor will email the new user a copy of the ODAR Representative Guide.**

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Create a Sponsor Account

A Sponsor is someone designated to create and maintain End-User accounts. **Sponsor accounts are always demo accounts. Sponsor accounts will be established for each Hearing Office Director and alternates. The alternates must be NON bargaining unit employees.**

Documents submitted via demo accounts are not received by DMA and are not routed to the electronic folder. Therefore, a sponsor cannot send or receive files unless the account has access to the Secure Messaging function. See the following steps for the creation of a Sponsor account.

Step 1: Select the **Create a Sponsor Account** hyperlink from the Account Maintenance Menu.

****Note that mandatory fields on this webpage are marked with a red asterisk (*).**

****The “Demo Account” checkbox at the top of the page is checked by default. This checkbox can not be changed.**

Step 2: Enter the desired **User ID** in the text box. Special characters (e.g., &, %, #, @, etc.) are not permitted (See Figure 14 below). **The User ID should be the first four letters of the employee’s last name and the last four numbers of their social security number.** If the last name is less than 4 characters, use the initial of their first name.

The screenshot shows the 'Create a Sponsor Account' page. The 'User Id: *' field is highlighted with a green box and a green arrow. The page includes a sidebar with navigation links and a main content area with various form fields for creating a sponsor account. The 'User Id' field is the first and most prominent field in the form.

Figure 14: Create a Sponsor -- User ID

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Step 3: Click the **Check User ID** button to verify if the User ID entered is unique.

Figure 15 below shows that the User ID entered does not exist. This User ID may be used for account setup. Continue to the next field.

If an alert is received stating that the User ID you entered is already in use, verify if the existing account is for the same user and whether the role is Sponsor. (See Figure 5 on page 5) You may need to update the existing account instead of creating a new account. If the existing account does not belong to the same user with a Sponsor account or if a new account is required for the same user, you must assign a different User ID to create the new account.

The screenshot shows the 'Electronic Records Express' interface for creating a sponsor account. A green box highlights an alert message: 'User ID newuser1 does not exist.' A green arrow points from the 'Account Maintenance Menu' on the left to the 'Check User ID' button. The form includes fields for User ID, First Name, Middle Name, Last Name, Organization Type, and Associated Sites, along with a 'Check User ID' button.

Figure 15: Create a Sponsor -- Check User ID Alert

Step 4: Enter the requested **User** information

- **First Name**
- **Middle Name**
- **Last Name**

Step 5: Enter the requested **Office** information:

- **Organization Type** – Select the SSA State ODAR Site from the dropdown menu
- **Associated Sites** – Select the site(s) that the Sponsor represents. Multiple sites can be selected by holding the CTRL key and clicking the desired sites.
- **Department**
- **Position**
- **Telephone Number(s)**
- **Phone Type(s)** – Select the type from the dropdown menu for each phone number entered
- **Email Address(es)**

Step 6:

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Step 7: Select the **Functions** (website utilities) to which the Sponsor will have access. Select all utilities the Sponsor needs. At this time, ODAR only has access to the Communications Utility and Send Individual Case (MER). (See Figure 16 below)

****Note:** Sponsors cannot provide access to or modify access to functions (website utilities) that are not assigned to their accounts.

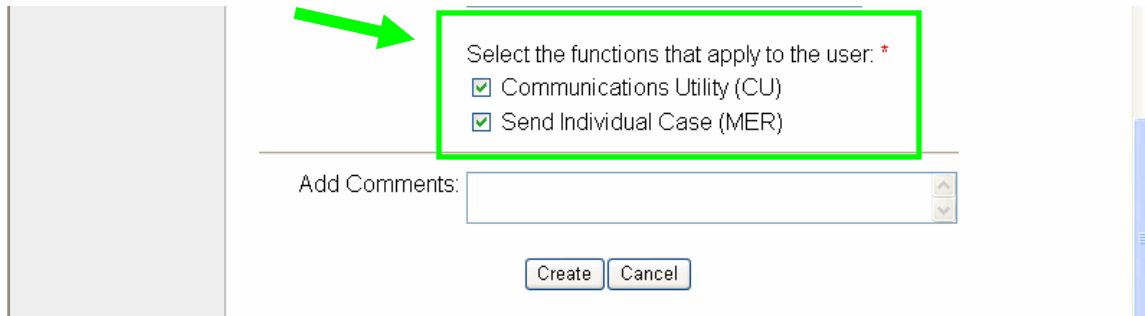
The image shows a software interface for creating a sponsor. A green arrow points to a dialog box titled "Select the functions that apply to the user: *". Inside the dialog, there are two checked checkboxes: "Communications Utility (CU)" and "Send Individual Case (MER)". Below the dialog is a text box labeled "Add Comments:" and two buttons, "Create" and "Cancel".

Figure 16: Create a Sponsor -- Functions

Step 8: Enter any **Comments** in the text box.

Step 9: Click the **Create** button to create the account **OR** click the **Cancel** button to cancel the account setup and return to the Account Maintenance Menu. The **Account Summary** page is generated when the **Create** button is selected. (See Figure 17 on page 14)

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The screenshot shows the 'Electronic Records Express' interface. The top navigation bar includes 'Social Security Online', 'www.socialsecurity.gov', and links for 'Home', 'Questions?', 'How to Contact Us', and 'Search'. A left sidebar contains links for 'Electronic Records Express Home', 'Account Maintenance Menu', 'Change Password', and 'Logout'. The main content area is titled 'Electronic Records Express Create a Sponsor Account' and displays the following information:

- User Id: ODARSP0N (Demo Account)
- First Name: Sponsor
- Middle Name:
- Last Name: ODAR
- Organization Type: SSA State ODAR Site
- Associated Sites: AL - BIRMINGHAM ODAR [X77]
- Department: Hearing Office
- Position: Hearing Office Director
- Primary Phone: 703-605-1111, Ext: , Type: WORK
- Alternate Phone: , Ext: , Type:
- Alternate Phone: , Ext: , Type:
- Alternate Phone: , Ext: , Type:
- Primary Email: hearing.director@ssa.gov
- Alternate Email:
- Function(s) selected: Communications Utility (CU), Send Individual Case (MER)

At the bottom, there is a section for 'Added Comments:' and three buttons: 'Edit', 'Submit', and 'Cancel'.

Figure 17: Create a Sponsor -- Account Summary

Step 10: From the **Account Summary** page, click the **Edit** button to return to the prior screen to change any information you have entered **OR** click the **Cancel** button to cancel the account setup **OR** click the **Submit** button to create the account.

Step 11: Clicking **Submit** will activate the new account. You will receive a **Confirmation** screen that provides the Temporary Password for the new account (See Figure 18 below).

The screenshot shows the 'Electronic Records Express' interface with the same top navigation and left sidebar as Figure 17. The main content area is titled 'Electronic Records Express Create a Sponsor Account' and displays the following confirmation message:

The account was successfully created. The User ID and instructions were emailed to newuser@ssa.gov. Contact the new user to provide the password. The temporary password is listed below and it has also been sent to you via email.

PJKJ5Q6W

Figure 18: Create a Sponsor -- Confirmation Screen

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Step 12: The following **emails** are automatically sent to provide notification of the new Sponsor account.

- a. A confirmation email that includes the temporary password and identifying information for the new Sponsor will be sent to the creator of the account.
(See Figure 19 below)

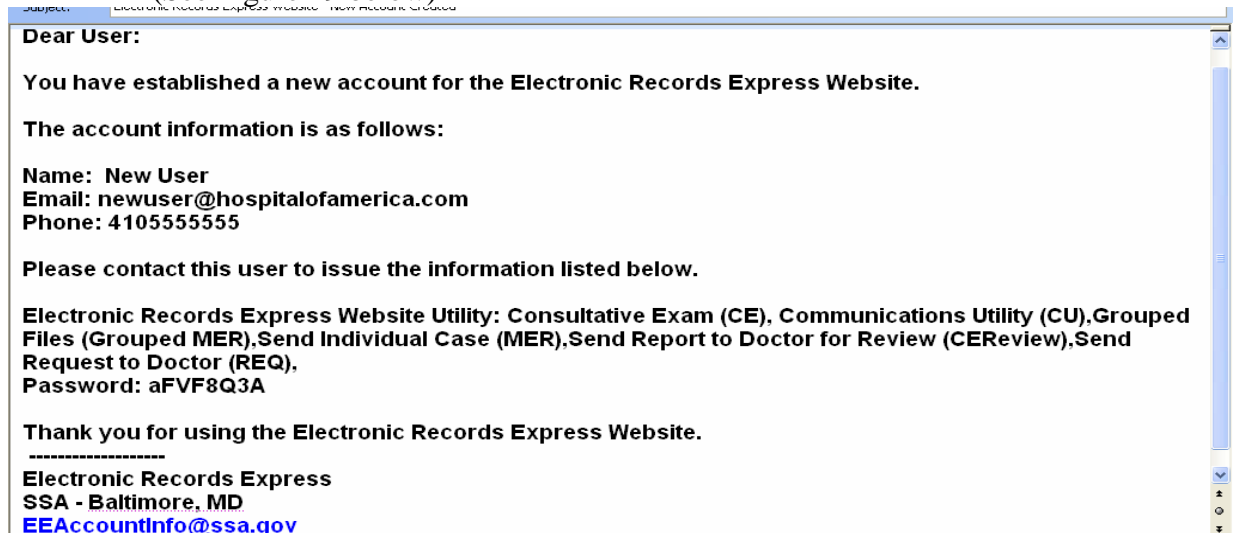


Figure 19: Email to creator that new sponsor account was created

- b. An email is sent to the new Sponsor to provide the User ID and instructions.
(See Figure 20 below)

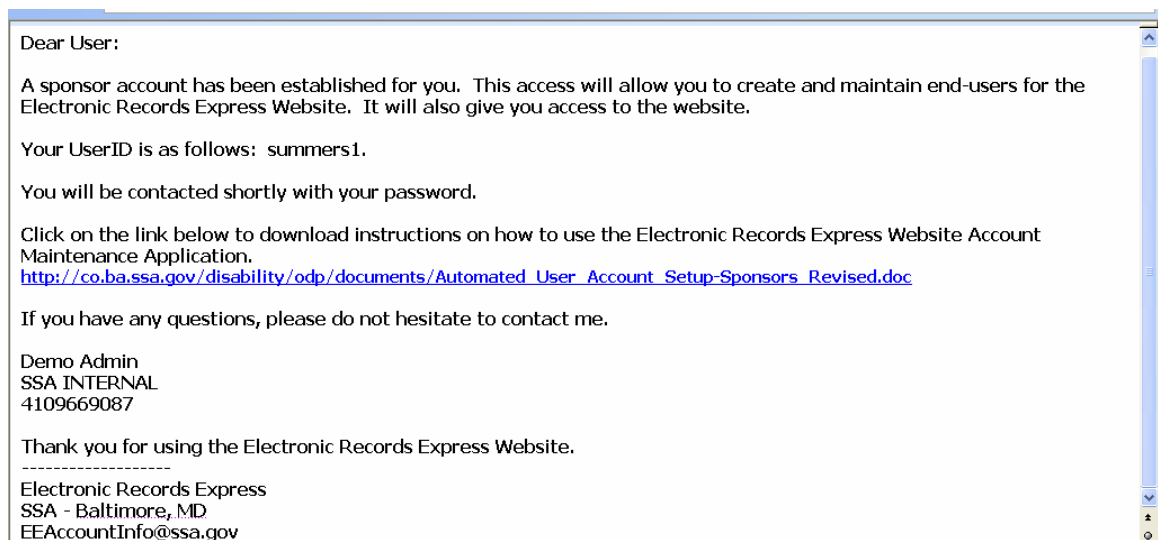


Figure 20: Email to new sponsor that new account was created

Step 1: The **Account Creator** must contact the new Sponsor to provide the password. The temporary password which was automatically generated by the website is valid for one time use only. The first time the new Sponsor logs into the website, he/she must change the password. **The creator should email the new sponsor the ODAR Regional Administrator and Sponsor Instruction Guide.**

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Search Accounts

There are two methods of searching for existing Electronic Records Express accounts: [Search on Specified Criteria](#) or [List All Accounts Alphabetically by User ID](#). Use either method to locate accounts to display, print or update.

Search on Specified Criteria

This search method allows the user to input criteria for filtering of the accounts to display. See the following steps to request an account Search on Specified Criteria (See Figure 21 on page 17):

Step 1: Select the **Search on Specified Criteria** hyperlink from the Account Maintenance Menu.

Step 2: Enter the information that you would like to use to filter the account(s) you wish to search. **Search criteria** includes:

- User ID
- First name
- Last name
- Phone number
- Email address
- Primary DDS Site

Step 3: Select one of the following to determine what accounts should display:

- Match **all** information entered
- Match **any** information entered
- Match information **exactly**

Step 4: Select the **function(s)** to be included in the search.

Step 5: Select one of the following to determine what accounts should display:

- Match **all** selected functions
- Match **any** selected functions

Step 6: Indicate whether to include **Demo Accounts** or **Exclude Deleted Accounts** by selecting the appropriate checkbox on the bottom of the page.

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The screenshot shows the 'Electronic Records Express' search page on the Social SecurityOnline website. The page has a red header with the title and navigation links: Home, Questions?, How to Contact Us, and Search. A left sidebar contains links for 'Electronic Records Express Home', 'Account Maintenance Menu', 'Change Password', and 'Logout'. The main content area is titled 'Electronic Records Express Search on Specified Criteria' and features a search form. The form includes input fields for User Id, First Name, Last Name, Phone, and Email, and a dropdown for Primary Site. Below these are three radio buttons for matching criteria: 'Match All Information Entered' (selected), 'Match Any Information Entered', and 'Match Information Exactly'. A section titled 'Select functions to include in the search' contains several checkboxes for various services like Consultative Exam (CE), Consultative Exam with Scanned Signature (CESS), Communications Utility (CU), Grouped Files (Grouped MER), Send Individual Case (MER), Send Report to Doctor for Review (CEReview), Send Request to Doctor (REQ), and Secure Messaging (SM). At the bottom of this section are two more radio buttons: 'Match All Selected Functions' (selected) and 'Match Any Selected Functions'. Further down are checkboxes for 'Include Demo Accounts' and 'Exclude Deleted Accounts'. The form concludes with 'Search' and 'Cancel' buttons. The footer includes the FIRSTGOV logo, a list of policy links (Privacy Policy, Accessibility Policy, Linking Policy, Site Map, Help), and the Benefits.gov logo.

Social SecurityOnline
www.socialsecurity.gov

Home Questions? How to Contact Us Search

Electronic Records Express Home

Account Maintenance Menu

Change Password

Logout

Electronic Records Express
Search on Specified Criteria

User Id:

First Name:

Last Name:

Phone:

Email:

Primary Site:

☒ Match All Information Entered
☐ Match Any Information Entered
☐ Match Information Exactly

Select functions to include in the search

☐ Consultative Exam (CE)
☐ Consultative Exam with Scanned Signature (CESS)
☐ Communications Utility (CU)
☐ Grouped Files (Grouped MER)
☐ Send Individual Case (MER)
☐ Send Report to Doctor for Review (CEReview)
☐ Send Request to Doctor (REQ)
☐ Secure Messaging (SM)

☒ Match All Selected Functions
☐ Match Any Selected Functions

☐ Include Demo Accounts
☐ Exclude Deleted Accounts

FIRSTGOV Privacy Policy | Accessibility Policy | Linking Policy | Site Map | Help Benefits.gov

Figure 21: Search on Specified Criteria

Step 7: Click the **Search** button to display the accounts meeting your criteria **OR** click the **Cancel** button to cancel the request and return to the Account Maintenance Menu. The **Search Results** screen is generated when the **Search** button is selected.

A search for users with assigned Primary Site of S02 yielded the results shown below. You may have to use the scroll bar to view the complete list. (See Figure 22 on page 18)

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Use the browser's Find feature (Ctrl+F on many browsers) to find specific text on this page.

User Id	Account Type	First Name	Last Name	Organization	Phone	Email	Site
111111ii	EndUser	std	ssr		1	qinghua.liu@ssa.gov	S02
111emily	EndUser	emily	hunter	ssa	410	qinghua.liu@ssa.gov	S02
1brami23	EndUser	William	Campbell		907-276-7374	wildbillcampbell@hotmail.com	S02
2345org2	EndUser	p	chandr		123	pradeep.chandrashekhar@ssa.gov	S02
akjames1	EndUser	David	James	VA	907-257-4735	David.James@med.va.gov	S02
asdf3333	EndUser	asdf	sadf		234234	david.hsieh@ssa.gov	S02
dbuise00	EndUser	Danielle	Buise		9999999999	danielle.c.buise@ssa.gov	S02
dbuise02	Organization	Danielle	Buise	LM	4541212222	danielle.c.buise@ssa.gov	S02
dbuise04	Organization	Danielle	Buise	LM	4102523233	danielle.c.buise@ssa.gov	S02
dbuise05	EndUser	Danielle	Buise	DLS	4102526565	danielle.c.buise@ssa.gov	S02
dbuise06	Organization	Danielle	Buise	LM	4105940224	danielle.c.buise@ssa.gov	S02
dbuise11	EndUser	Danielle	Buise		4105970224	danielle.c.buise@ssa.gov	S02
dbuise20	EndUser	Danielle	Buise		4105970224	danielle.c.buise@ssa.gov	S02
df343445	EndUser	asdfasdf	ffadfaf		345345	david.hsieh@ssa.gov	S02
dhe12111	Organization	test	test	one'two'three'four'five'six'seven'eight	11111	david.hsieh@ssa.gov	S02
dhe33333	EndUser	sadf	adsf		234234	david.hsieh@ssa.gov	S02
dhe55555	EndUser	adf	asdf		324234	david.hsieh@ssa.gov	S02

Figure 22: Search Results Screen

Step 8: **Sort** the displayed accounts by any of the column headers on the Search Results screen. Click the blue **column header** to sort the listing by that field. By default, the search results will be sorted by **User ID**.

Step 9: **View** any account on the Search Results screen by clicking on the User ID, First Name, or Last Name of the desired account. The **Account Summary** screen will display for the selected account. (See Figure 29 on page 25)

Step 10: Select the **View Log History** hyperlink from the **Account Summary** screen to view the last 10 transactions on the selected account. (See Figure 29 on page 25)

User Log History				
User	Author	Action	Action Date	Comment
ODAR1111	ACU SYSTEM	CHANGED PASSWORD	2006-07-28 10:13:20.96	Force Change Password
ODAR1111	JBROCKM1	RESET PASSWORD	2006-07-28 10:10:01.0	
ODAR1111	ACU SYSTEM	CHANGED PASSWORD	2006-07-20 09:22:48.897	Force Change Password
ODAR1111	JBROCKM1	CREATE	2006-07-20 08:02:31.0	Created for ODAR Demo Acct

Close

Figure 23: User Log History

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List All Accounts Alphabetically by User ID

This search method displays all existing accounts sorted by User ID. See the following steps to request a list of all accounts sorted alphabetically by User ID.

Step 1: Select the **List All Accounts Alphabetically by User ID** hyperlink from the Account Maintenance Menu.

Step 2: The **List All Accounts** screen will be displayed listing all registered accounts. This list will be sorted in alphabetical order by User ID. Use the scroll bars to see the entire list. (See Figure 24 below)



User Id	Account Type	First Name	Last Name	Organization	Phone
00000000	RegionalAdmin	AR	X	AR - FORT SMITH OHA [X55]	456

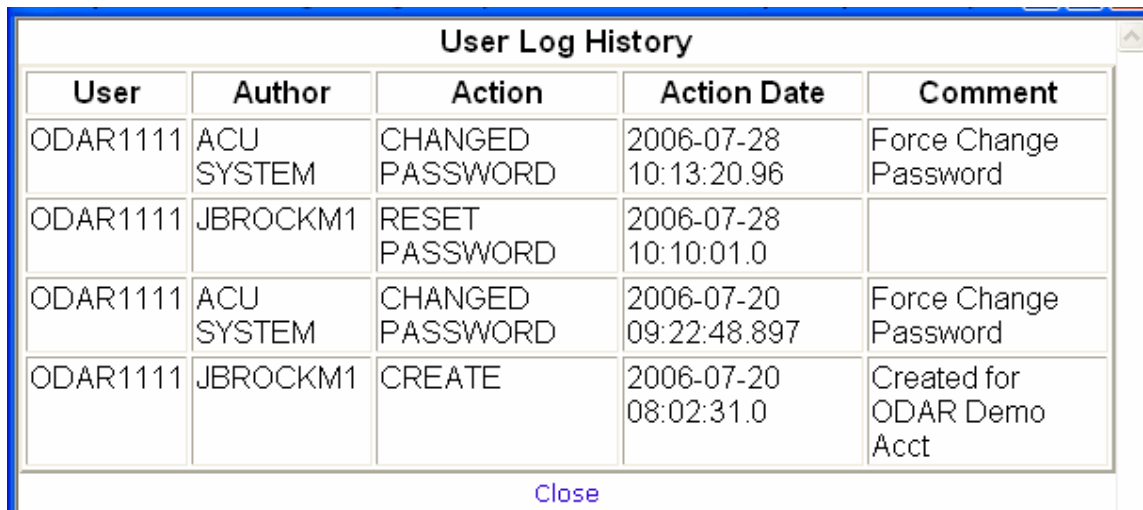
Figure 24: List All Accounts Screen

Step 11: **Sort** the displayed accounts by any of the column headers on the List All Accounts screen. Click the blue **column header** to sort the listing by that field. By default, the search results will be sorted by **User ID**.

Step 12: **View** any account on the List All Accounts screen by clicking on the User ID, First Name, or Last Name of the desired account. The **Account Summary** screen will display for the selected account. (See Figure 29 on page 25)

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Step 13: Select the **View Log History** hyperlink from the **Account Summary** screen to view the last 10 transactions on the selected account as seen in Figure 25 below. (See Figure 29 on page 25)



The screenshot shows a window titled "User Log History" with a table containing four rows of user activity. The table has five columns: User, Author, Action, Action Date, and Comment. The data is as follows:

User	Author	Action	Action Date	Comment
ODAR1111	ACU SYSTEM	CHANGED PASSWORD	2006-07-28 10:13:20.96	Force Change Password
ODAR1111	JBROCKM1	RESET PASSWORD	2006-07-28 10:10:01.0	
ODAR1111	ACU SYSTEM	CHANGED PASSWORD	2006-07-20 09:22:48.897	Force Change Password
ODAR1111	JBROCKM1	CREATE	2006-07-20 08:02:31.0	Created for ODAR Demo Acct

Below the table, there is a "Close" button.

Figure 25: User Log History

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Update an Existing Account

Existing Accounts can be updated by performing the following tasks: [Modify Account Information](#), [Suspend an Account](#), [Reactivate a Suspended Account](#), [Reset a Password](#), and [Delete an Account](#).

If you wish to update your own account select one of the following tasks: [Modify Your Account Information](#) or [Change Your Password](#).

Modify Account Information

Administrators can modify all types of accounts. All data stored within the account can be modified except the **User ID**, **Role**, and **Status**. Additionally, the **Demo Indicator** cannot be removed from Regional Administrator and Sponsor accounts. See the following steps to Modify Account Information.

- Step 1:** Select the desired account to modify via the [Search on Specified Criteria](#) or [List All Accounts Alphabetically by User ID](#) feature.
- Step 2:** Click the **Modify** button from the bottom of the Account Summary page. (See the [Account Summary](#) screen Figure 31 on page 27)
- Step 3:** The **Modify Account** page is displayed. Make any necessary modifications. Use the scroll bar to view additional fields for modification. (See Figure 26 on page 22)
- Step 4:** Click the **Modify** button on the bottom of the Modify Account page.

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Electronic Records Express

Modify Account

An asterisk (*) indicates a mandatory field.

☐ Demo Account

User Id: **buisse006**

Role: **Individual End-User**

Status: **Active**

First Name: *

Middle Name:

Last Name: *

Organization Type: *

Organization Name:

Department:

Position:

Primary Phone: * Ext:

Alternate Phone: Ext:

Alternate Phone: Ext:

Alternate Phone: Ext:

Primary Email: *

Alternate Email:

Address Line 1: *

Address Line 2:

Address Line 3:

Address Line 4:

Country: *

City: *

State/Territory: *

Zip Code: *

Primary Site: *

Primary Site Contact: *

Select the functions that apply to the user: *

☐ Consultative Exam (CE)

☒ Consultative Exam with Scanned Signature (CESS)

☒ Communications Utility (CU)

☐ Grouped Files (Grouped MER)

☒ Send Individual Case (MER)

☒ Send Report to Doctor for Review (CEReview)

☐ Send Request to Doctor (REQ)

☐ Secure Messaging (SM)

Add Comments:

[View Log History](#)

Figure 26: Modify Account Screen

Step 5: An **Account Summary** page will be displayed for the account. Verify that the information on the Account Summary page is accurate.

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Step 6: From the Account Summary page, click the **Edit** button to return to the prior screen to change any information you have entered **OR** click the **Cancel** button to cancel the account modification **OR** click the **Submit** button to modify the account.

Step 7: A **Confirmation Screen** will display after selecting the **Submit** button. (Figure 27 below)

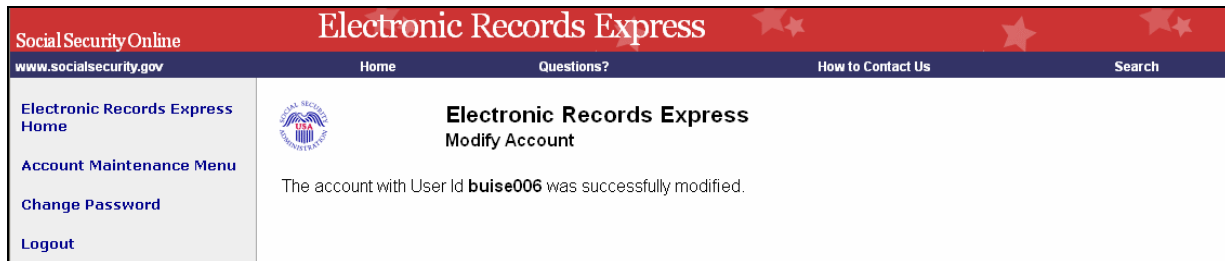


Figure 27: Modify Confirmation Screen

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Suspend an Account

Accounts will be suspended when the rules or regulations governing Electronic Records Express Website accounts are violated. Someone allowing another person to use their Individual End-User account is an example of a violation that would warrant suspension of the account. See the following steps to suspend an account.

Step 1: Select the desired account to suspend via the [Search on Specified Criteria](#) or [List All Accounts Alphabetically by User ID](#) feature.

Step 2: Click the **Suspend** button from the bottom of the Account Summary page. (See the [Account Summary](#) screen Figure 29 on page 25)

Step 3: A **Confirmation Screen** will display after selecting the **Suspend** button. (Figure 28 below)

Note: The account status will now be changed to **Suspended**.

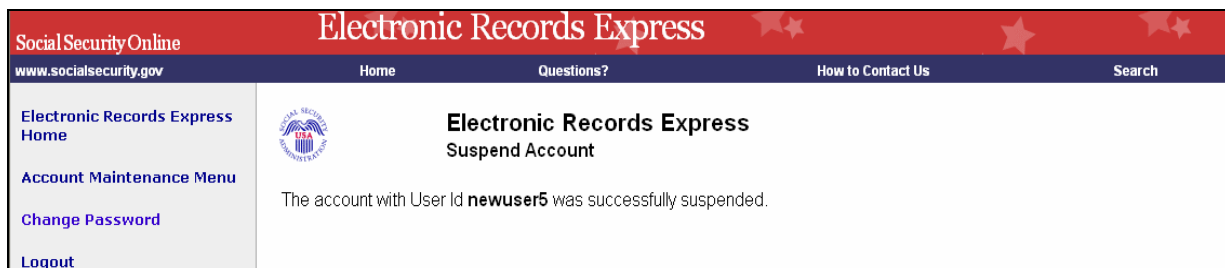


Figure 28: Suspend Confirmation Screen

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Reactivate a Suspended Account

Accounts that have been suspended because the rules or regulations governing Electronic Records Express Website accounts were violated will be reactivated once the Sponsor indicates that the user has been advised of the infraction. Someone allowing another person to use their Individual End-User account is an example of a violation that would warrant suspension of the account. See the following steps to reactivate a suspended account.

Step 1: Select the desired suspended account to reactivate via the [Search on Specified Criteria](#) or [List All Accounts Alphabetically by User ID](#) feature.

Step 2: Click the **Reactivate** button *OR* click the **Reset Password** button from the bottom of the Account Summary page. (See Figure 29 below)

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Electronic Records Express
Account Summary

User Id: buise006

Role: Individual End-User
Status: Suspended

First Name: Danielle
Middle Name:
Last Name: Buise

Organization Type: Attorneys Office
Organization Name: LM
Department:
Position:

Primary Phone: 965858522 Ext: 333 Type: WORK
Alternate Phone: 7777777777 Ext: 555 Type: FAX
Alternate Phone: Ext: Type:
Alternate Phone: Ext: Type:

Primary Email: danielle.c.buise@ssa.gov
Alternate Email:
Address Line 1: 7152 Windsor Blvd
Address Line 2:
Address Line 3:
Address Line 4:
City: Baltimore
State/Territory: MD
Zip Code: 21244
Country: United States

Primary Site: AL - BIRMINGHAM OHA [X77]
Primary Site Contact: Buise, Danni
Function(s) selected: Consultative Exam with Scanned Signature (CESS)
Communications Utility (CU)
Send Individual Case (MER)
Send Report to Doctor for Review (CEReview)

[View Log History](#)

[Modify](#) [Reactivate](#) [Reset Password](#) [Delete](#)

Link to View Log History

Figure 29: Account Summary Reactivate Screen

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Step 3: A Confirmation Screen will display after selecting either the **Reactivate** or **Reset Password** button. (See Figure 30 below)

Note: The account status will now be changed to **Active**.

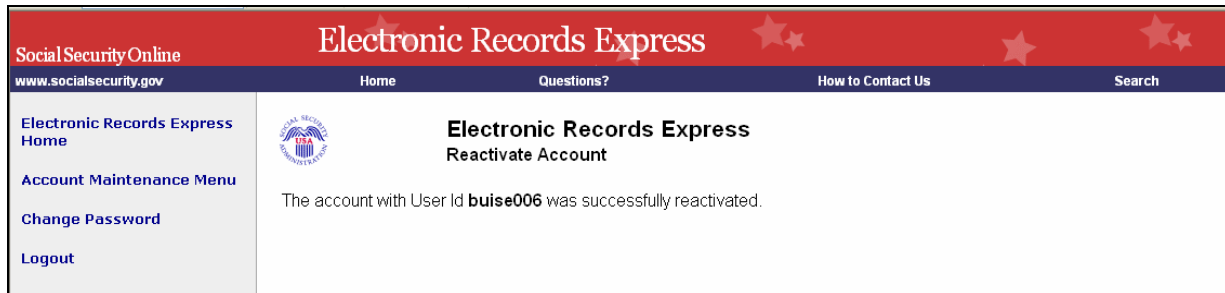


Figure 30: Reactivate Confirmation Screen

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Reset a Password

Reset the account password when users forget their passwords. Additionally, the system will lock an account if the wrong password is entered three times during login. In the latter situation the status for the account will be changed to **Locked**. You must reset the password to unlock a locked account. See the following steps to reset a password.

Step 1: Select the desired account to reset the password via the [Search on Specified Criteria](#) or [List All Accounts Alphabetically by User ID](#) feature.

Step 2: Click the **Reset Password** button from the bottom of the Account Summary page.
(See Figure 31 below)

The screenshot shows the 'Electronic Records Express Account Summary' page. The left sidebar contains links: 'Electronic Records Express Home', 'Account Maintenance Menu', 'Change Password', and 'Logout'. The main content area displays the following information:

- User Id: ODAR1111 (Demo Account)
- SSA ID: G8DEN5866E
- Role: Individual End-User
- Status: Active
- First Name: John
- Middle Name:
- Last Name: Doe
- Organization: Attorneys Office
- Type:
- Organization Name:
- Department:
- Position:
- Primary Phone: 7037037033 Ext: Type: WORK
- Alternate Phone: Ext: Type:
- Alternate Phone: Ext: Type:
- Alternate Phone: Ext: Type:
- Primary Email: odar.hq.rep.mail@ssa.gov
- Alternate Email:
- Address Line 1: Anywhere
- Address Line 2:
- Address Line 3:
- Address Line 4:
- City: Falls Church
- State/Territory: VA
- Zip Code: 22041
- Country: United States
- Primary Site: DC - WASHINGTON ODAR [X73]
- Primary Site: Brockman, Joycelene
- Contact:
- Function(s): Communications Utility (CU)
- selected: Send Individual Case (MER)
- Function(s): Communications Utility (CU)
- selected: Send Individual Case (MER)

At the bottom, there is a link 'View Log History' and a box containing four buttons: 'Modify', 'Suspend', 'Reset Password', and 'Delete'. A large green arrow points to this box.

Figure 31: Account Summary Reset Password Screen

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Step 3: A **Confirmation Screen** that provides a **Temporary Password** for the account will display after selecting the **Reset Password** button. (See Figure 32 below)

Note: The account status will now be changed to **Active** if the status was **Locked** previously.

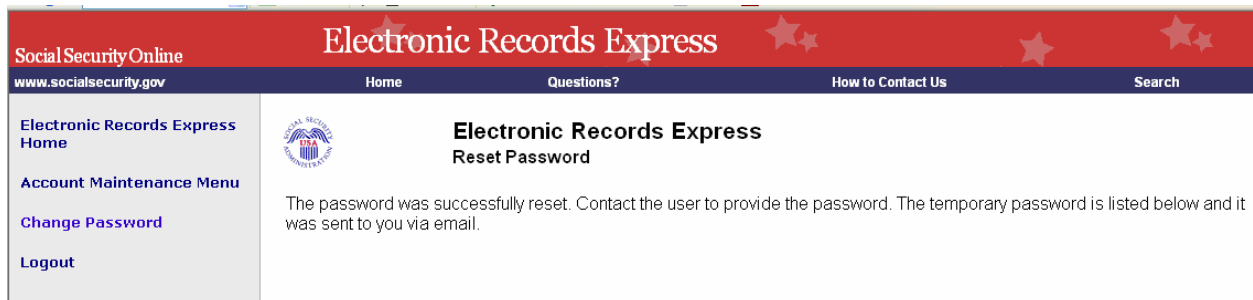


Figure 32: Reset Password Confirmation Screen

Step 4: The following **emails** are automatically sent to provide notification of the reset password.

- a. The Sponsor (Primary Site Contact) will receive an email that includes the reset temporary password and identifying information for the account. The sponsor is advised in this email to contact the user to provide the reset password.
- b. An email is sent to the user to advise that the password was reset.

Step 5: The **Sponsor** (Primary Site Contact) must contact the user to provide the password. The temporary password which was automatically generated by the website is valid for one time use only. The user is forced to change the password during the first login to the website after the password is reset.

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Delete an Account

Accounts are deleted only if the account was erroneously established. **A deleted account can never be reactivated, and the User ID cannot be used again in the future.** Therefore, use caution when deleting an account. See the following steps to delete an account.

- Step 1:** Select the desired account for deletion via the [Search on Specified Criteria](#) or [List All Accounts Alphabetically by User ID](#) feature. (See Page 16)
- Step 2:** Click the **Delete button** from the bottom of the Account Summary page. (Figure 33 on page 30)

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Electronic Records Express Account Summary

User Id: **ODAR1111 (Demo Account)**

SSA ID:

Role: **Individual End-User**

Status: **Active**

First Name: **John**

Middle Name:

Last Name: **Doe**

Organization **Attorneys Office**

Type:

Organization Name:

Department:

Position:

Primary Phone: **7037037033** Ext: Type: **WORK**

Alternate Phone: Ext: Type:

Alternate Phone: Ext: Type:

Alternate Phone: Ext: Type:

Primary Email:

Alternate Email:

Address Line 1: **Anywhere**

Address Line 2:

Address Line 3:

Address Line 4:

City: **Falls Church**

State/Territory: **VA**

Zip Code: **22041**

Country: **United States**

Primary Site: **DC - WASHINGTON ODAR []**

Primary Site Contact:

Function(s) **Communications Utility (CU)**
selected: **Send Individual Case (MER)**

Function(s) **Communications Utility (CU)**
selected: **Send Individual Case (MER)**

[View Log History](#)

[Modify](#) [Suspend](#) [Reset Password](#) [Delete](#)

Figure 33: Account Summary Delete Screen

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Step 3: A **Confirmation Request Screen** will display asking you to confirm your request to delete the specified account. Click the **Cancel** button to cancel the account deletion and return to the Account Maintenance Menu **OR** click the **Continue** button to delete the account. (See Figure 34 below)

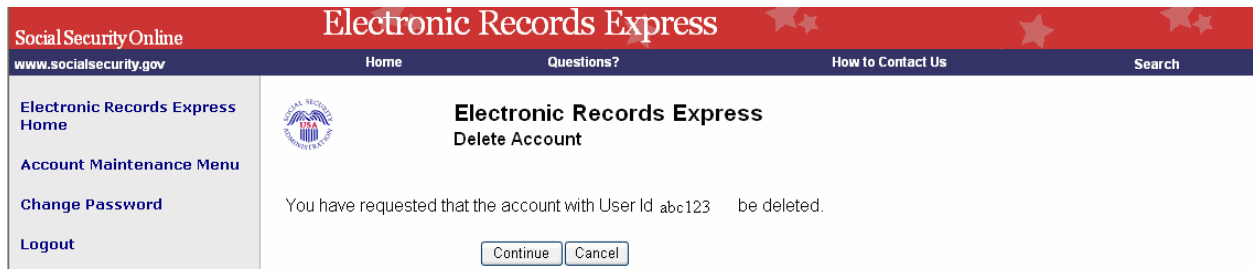


Figure 34: Deletion Confirmation Request Screen

Step 4: Clicking **Continue** will delete the account. A **Confirmation Screen** will display after selecting the **Continue** button. (See Figure 35 below)

Note: The account status will now be changed to **Deleted**.

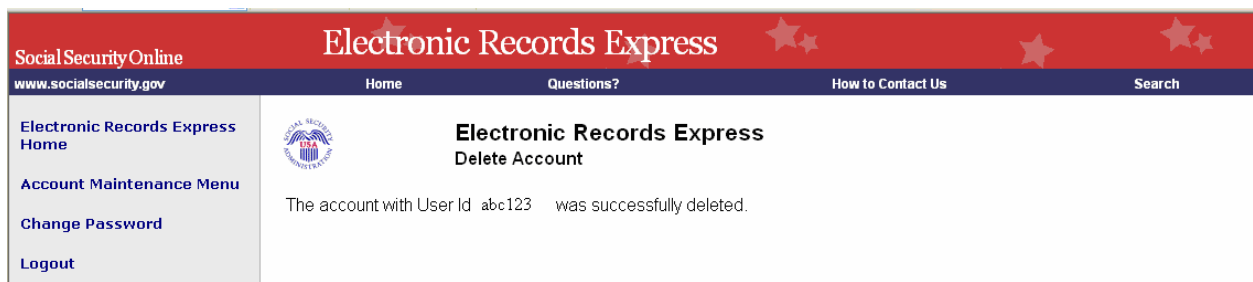


Figure 35: Deletion Confirmation Screen

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Modify Your Account Information

All data stored within your personal account can be modified except the **User ID**, **Role**, and **Status**. See the following steps to modify your personal account information.

Step 1: Select the **Modify your Account Information** hyperlink from the Account Maintenance Menu. (See Figure 36 below)

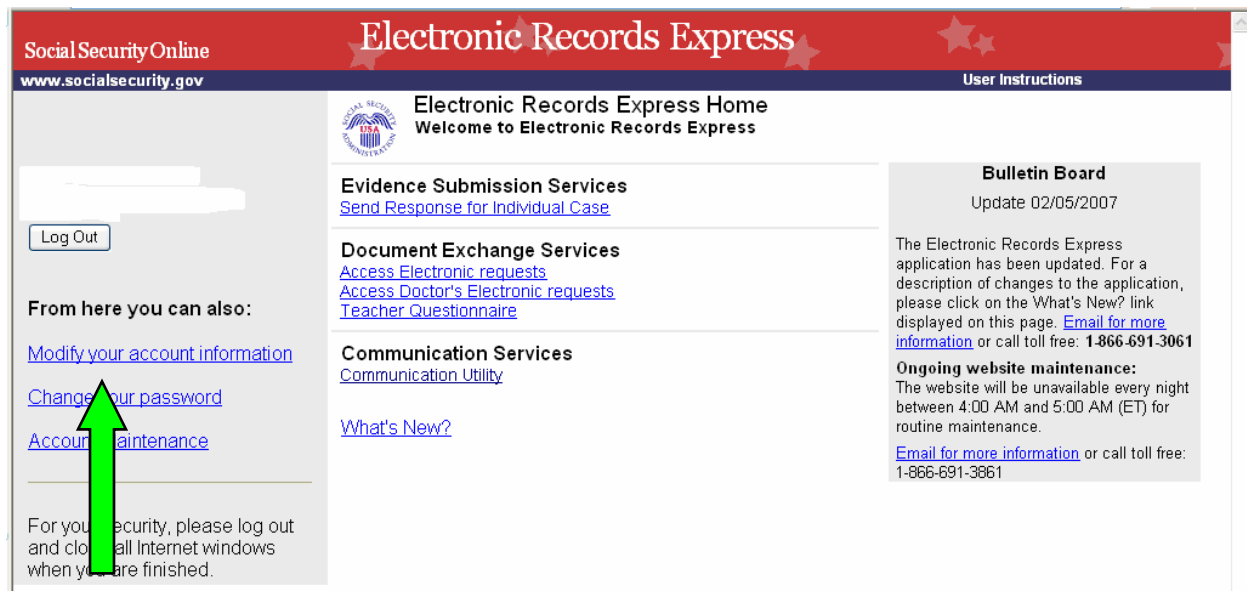


Figure 36: Modify Your Account Information Selection

Step 2: The **Modify Your Account** page is displayed. Make any necessary modifications. Use the scroll bar to view additional fields for modification. (See Figure 39 on page 39)

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Electronic Records Express

Modify My Account

An asterisk (*) indicates a mandatory field.

User Id: **ODAR1111**

Role: **Individual End-User**

Status: **Active**

First Name: **John**

Middle Name:

Last Name: **Doe**

Organization Name:

Department:

Position:

Primary Phone: * Ext:

Alternate Phone: Ext:

Alternate Phone: Ext:

Alternate Phone: Ext:

Primary Email: *

Alternate Email:

Address Line 1: *

Address Line 2:

Address Line 3:

Address Line 4:

Country: *

City: *

State/Territory: *

Zip Code: *

Figure 37: Modify My Account Screen

Step 3: Click the **Modify** button on the bottom of the Modify Account page.

Step 4: An **Account Summary** page will be displayed for the account. Verify that the information on the Account Summary page is accurate.

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Step 5: From the Account Summary page, click the **Edit** button to return to the prior screen to change any information you have entered **OR** click the **Cancel** button to cancel the account modification **OR** click the **Submit** button to modify your account.

Step 6: A **Confirmation Screen** will display after selecting the **Submit** button. (See Figure 38 below)



Figure 38: Modify My Account Confirmation Screen

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Change My Password

You should change your password periodically to assure security of your account. See the following steps to change the password on your personal account.

Step 1: Select the **Change My Password** from the Account Maintenance Menu. (See Figure 40 below)



Figure 39: Change My Password Selection

OR

Select the **Change Your Password** from the sidebar selections on the Electronic Records Express Homepage. (See Figure 40 below)

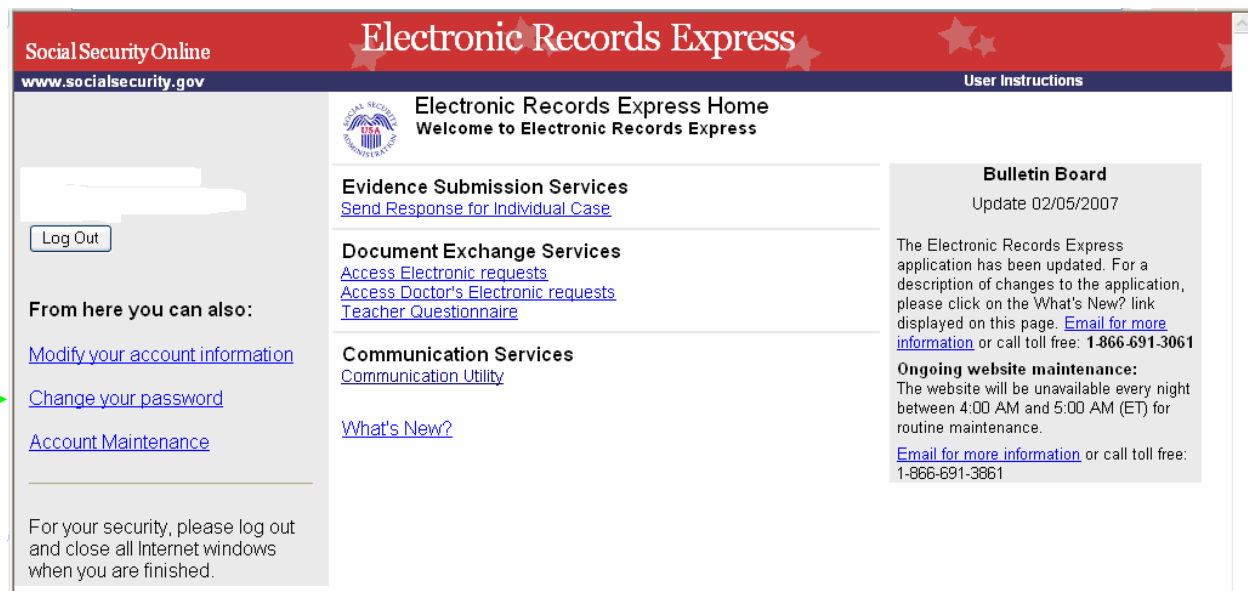
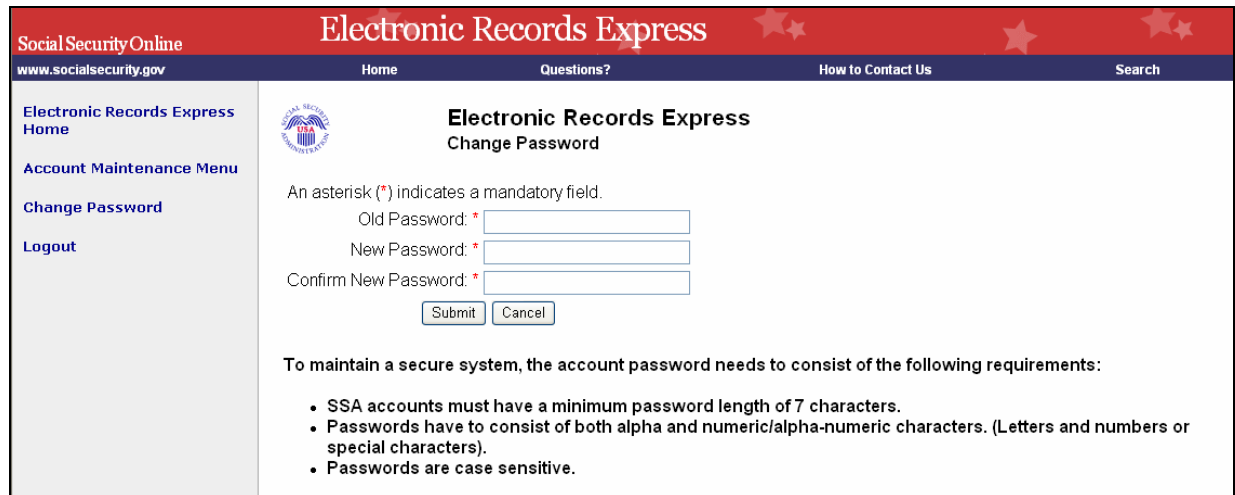


Figure 40: Change Password -- Sidebar Selection

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Step 2: The **Change Password** page is displayed. (See Figure 41 below)



The screenshot shows the 'Electronic Records Express' page for changing a password. The page has a red header with the title and three stars. Below the header is a dark blue navigation bar with links: Home, Questions?, How to Contact Us, and Search. On the left is a light blue sidebar with links: Electronic Records Express Home, Account Maintenance Menu, Change Password, and Logout. The main content area has the title 'Electronic Records Express Change Password' and the Social Security Administration seal. It includes a note: 'An asterisk (*) indicates a mandatory field.' followed by three input fields: 'Old Password: *', 'New Password: *', and 'Confirm New Password: *'. Below these are 'Submit' and 'Cancel' buttons. At the bottom, it states: 'To maintain a secure system, the account password needs to consist of the following requirements:' followed by a bulleted list: 'SSA accounts must have a minimum password length of 7 characters.', 'Passwords have to consist of both alpha and numeric/alpha-numeric characters. (Letters and numbers or special characters).', and 'Passwords are case sensitive.'

Figure 41: Change Password Screen

Step 3: Enter the **Old Password** (current password).

Step 4: Enter the **New Password** using the password requirements listed on the screen.

Step 5: Enter the new password again in the **Confirm New Password** field to verify it was entered correctly.

Step 6: Click the **Submit** button to submit your password change **OR** click the **Cancel** button to cancel the password change.

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